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ABSTRACT

The background, skills, and views of 20 distinguished professionals were surveyed to provide information about career development in institutional research and to provide ideas about program development. The respondents were members of the Association for Institutional Research and they included seven institutional researchers and planners, three faculty members, four academic administrators, three nonacademic administrators, and three senior state board staff members. With regard to background, two factors were widely perceived to be valuable in most academic professional roles (excluding nonacademic administration): a doctorate and experience as a faculty member. The dominant theme among the responses from the seven institutional researchers was the need for an analytical background or a background in policy analysis. Overall, responses suggest that the most important professional skills (in order) are (1) interpersonal, (2) writing, (3) analytical, and (4) management. The more technical skills (computer, research design, and statistical) received somewhat lower overall ratings. The faculty members placed more emphasis on research, and the two categories of administrators placed more emphasis on management skills. Many of the respondents viewed all of their professional activities as job-related, and they viewed the primary career options for institutional researchers as teaching, nonacademic administration, state-level administration/research, and institutional research. Several respondents suggested avoiding long-term careers in institutional research and advocated a variety of experiences. A condensed version of the questionnaire, the AIR PDS (Professional Development Services) Board Career Development Survey, is appended. (SW)

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CAREER DEVELOPMENT IN INSTITUTIONAL RESEARCH

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A major issue for the professional in institutional research is how one develops a successful career. This is not a topic likely to be found in the annual work plan of an office of institutional research, but it is one that should lend itself readily to the special skills of institutional research—i.e., the skills of self-study.

This report has been prepared at the request of the AIR Professional Development Services (PDS) Board, created in 1981 to develop programs designed to meet the professional development and continuing education needs of AIR members. The paper has two objectives: (1) to provide some basic insights into career development in institutional research, insights that may be of general interest to the membership, and (2) to assist the PDS Board in program development.

Methodology. The analysis is based on the results of a survey mailed to twenty AIR members, selected by the author because they have been active, highly visible members of AIR; because they have achieved responsible positions in higher education; or because they have made noteworthy contributions in their respective subfields (institutional research, teaching, administration, etc.). The respondents are, in many cases, distinguished in all three respects. Perhaps they are best characterized as a "panel of experts."

The sample is too small, and many of the questions are too open-ended, to subject the data to formal statistical analysis. Whenever possible, responses have been quantified. However, the primary object of the analysis is to identify general patterns in a series of narrative, open-ended responses. An abbreviated version of the survey instrument is included as as appendix to the paper.

The respondents. The twenty respondents include seven institutional researchers and planners (several are directors at major universities); three faculty members (full professors); four academic administrators; three nonacademic administrators (two budget officers and a director of computer services); and three fairly senior state board staff members (two academic officers and one finance officer).

All but two of the respondents have performed two or more of the professional roles noted in the preceding paragraph. Most of them have changed employment to obtain promotions, although a few have achieved fairly senior positions by remaining at a single institution. All twenty started their higher education careers at least ten years ago, and half began their higher education careers before 1965. The group averages twenty years of experience in higher education and includes five former AIR presidents.

Eighteen of the twenty hold doctorates. The most prevalent doctoral field is higher education (eight respondents), followed by psychology (three). The remaining members of the group hold doctorates in business, communications, educational administration, educational research, education and economics, institutional research, and operations research.

Respondents were asked (in Question 7) to identify their *three* major interests. The dominant pattern in the responses was one of variety; the areas checked by five or more respondents included planning, bugeting, information systems, program review, and external relations. Perhaps of equal interest, several respondents included entries under "other," to include financial aid, outcomes, research methods, forecasting, and research on college faculty.

Findings

Professional background and skills. Questions 9, 10, and 11 relate to the professional background and skills needed to attain and perform the current role of the respondent.[1] With regard to background, two things are widely perceived to be valuable in most academic professional roles (excluding nonacademic administration): a doctorate and experience as a faculty member. It is interesting to note that ten (50%) of the respondents have held faculty positions at some point in their careers. The percentage of the total AIR membership who have held faculty appointments may be much lower.

Although the number of respondents in each professional subgroup is small, there are some dis-

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cernable patterns in subgroup comments about professional background. The dominant theme among the responses from the seven institutional researchers was the need for an analytical background or a background in policy analysis.[2] Approximately half of the institutional researchers felt strongly that a quantitative background is also important.

Among the other subgroups, faculty members stressed the importance of a "track record" in research and publication; academic administrators stressed the importance of a faculty background; nonacademic administrators, who may be somewhat more specialized, stressed the importance of a background in finance, business, or computers; and the state-level respondents stressed the importance of a broad background in higher education.

The responses to Question 11 suggest that the most important professional *skills* (in order) are (1) interpersonal, (2) writing, (3) analytical, and (4) management. The more technical skills (computer, research design, and statistical) received somewhat lower overall ratings. (It is important to reemphasize that the respondents are not entry-level people but are, for the most part, managers in their respective areas of responsibility.)

As might be expected, there is some variation in the skills viewed as most important by the various professional subgroups. Those skills identified by the institutional researchers were similar to those identified by the entire sample: writing, interpersonal, and analytical. The faculty members placed more emphasis on research skills, and the two categories of administrators placed more emphasis on management skills.[3] Based on the open-ended responses to Question 10, the only significant category not covered in Question 11 is "political" skills.[4]

Professional and personal values and priorities. Career development means not only advancement but also the pursuit of work that is satisfying. What is satisfying is largely a function of one's personal and professional values and preferences. There are three questions in the survey that shed some light on the preferences and priorities of the respondents: 12, 13, and 15. The first two relate to professional likes and dislikes. The third relates to personal and professional priorities.

The dominant themes in the responses to Question 12 (*what do you like best about your current position?*) are the ability to influence or work with decisions, the opportunity to work with good people, and constant change or variety in professional responsibilities. There are no striking contrasts among the professional subgroups.

Perhaps the most interesting feature of the responses to Question 13 (*what do you like least about your current position?*) is that several respondents have no complaints. However, among those who *do* have complaints, the dominant dislikes are for bureaucracy (red-tape, paperwork) and routine. Other concerns include a limited opportunity for promotion, an immediate superior who does not value research and planning, and insufficient time to make carefully considered decisions. (The last comment comes from two of the three state-level respondents.)

Question 15 relates to personal and professional priorities. Among the twenty respondents, all of whom have been successful in terms of career advancement, the most important goal is job satisfaction, followed (at some distance) by salary. Among the less important considerations are prestige, security, wishes of family, and (least important) health. Quality of life, though not a top priority, is an important consideration for many of the respondents.

Clearly, different people gain satisfaction from their jobs for different reasons. Some of the items listed in the "other" catagory of Question 15 provide insight on this point. Various respondents give high priority to job challenge, responsibility, impact, the opportunity to work with capable associates, and the opportunity to serve others. Among the professional subgroups, faculty members place above-average priority on security and quality of life, academic administrators place above-average emphasis on quality of life, and nonacademic administrators give top priority to salary.

Professional development. Question 14 pertains to professional development activities (*since you completed your formal education, what kinds of activities/experiences have contributed most to your professional development?*). The respondent is asked to identify both job-related and non-job-related activities. There are two particularly striking findings in this area. First, among the twenty respondents, the dominant sources of professional development are *job-related* activities and experiences: the opportunity to work with good people, constant change in job assignments, and increasing levels of responsibility. Second, many of the respondents tend to view virtually all of their professional activities as job-related.[5]

Among the professional subgroups, the institutional researchers give top priority to the quality of their job assignments, but they also place some value on reading and professional organizational activities (the latter providing them with professional contacts, new ideas, and opportunities to organize and present their own ideas). Faculty members see virtually all of their professional activities as job-related, giving top priority to research and publishing. Nonacademic administrators assign some value to teaching and publication, but (unlike the others) tend to view these activities as non-job-related. The state-level respondents stress the variety of work experiences/assignments and the opportunity to interact with many different constituencies.

Career options. Although the career options available to a capable person are probably unlimited, realistically there are some career paths which represent more logical progressions than others. In Question 16, the respondents are asked to identify three -five major career options (not necessarily confined

to higher education) which are open to institutional researchers. The respondents are also asked to identify the "critical factors" which affect an individual's access to each of these options.

The career option mentioned most frequently is nonacademic administration (budget, finance, and planning). The critical factors are experience in finance and budgeting and administrative experience. Teaching is mentioned as an alternative by half of the respondents. As might be expected, the critical factors in this area include knowledge of subject matter, teaching experience, research and publication, and a doctorate.

Three other options are mentioned by approximately one-third of the respondents: (1) a career in state-level administration or research, which requires 5-10 years experience in higher education, good interpersonal skills, and political acumen; (2) a career in institutional research, which requires good institutional research skills; and (3) a career in industrial management or research, which requires experience and skills—such as management, marketing, research, and finance—that are marketable in the private sector. It is interesting to note that several respondents suggested that two critical factors in almost all professional endeavors are ability and luck.

Some advice. Without question, the most interesting (and most difficult to analyze) responses to the survey were the open-ended responses to Question 17 (*what would be your advice to a young(er) institutional researcher who is looking for both job satisfaction and professional mobility during the next 25-40 years?*). Although most of the respondents touched on several different issues, it is possible to identify a few general themes. One is a feeling of skepticism about long-term careers in institutional research:

> An individual should seek to keep his/her options open. Five years experience in institutional research provides a good solid grounding in the operations of a university or college. But leave then. If you want a senior administrative position in postsecondary education, then seek an academic appointment for another five or so years. . . .In any case, beware of a long-term career in institutional research. It has no obvious career path beyond the director position. *(institutional researcher)*

> Do not enter the field of institutional research! Take a position as assistant to a vice president or an assistant vice president and work up through that ladder. Institutional research has been pushed into the background and is no longer an important management tool/need. *(institutional researcher)*

> Frankly, I think persons in institutional research ought to be satisfied with doing it well because my contacts with the area lead me to believe that like student affairs it is a "dead end" field in higher education for most who get into it. *(state-level administrator)*

> Stay in institutional research just long enough to establish a track record. Don't stay too long. *(nonacademic administrator)*

Another general theme in the responses is that the individual needs to decide whether to be a generalist or a specialist—a "people-person" or a technician:

> There are really two options, depending on one's interests and abilities: (1) specialize intensively and (2) generalize, keeping options open. To advance through specialization, one must have a genuine, consuming interest in the field, and also the field must be one with long-run promise. Generalists, of course, run the risk of not being able to keep abreast of any field, but in general are more qualified for administrative positions because of their breadth of experience. *(faculty member)*

> You have to look outside your current responsibilities and determine if you are more comfortable in dealing with people or with data. . . .The best researcher is not always the best administrator. Unfortunately, the career options that offer the greatest financial opportunities are management/administration. The bottom line then becomes one of choosing between monetary rewards and job satisfaction. *(state-level administrator)*

> You need to have a technical skill, something that will make you valuable. *(nonacademic administrator)*

A third general theme is that one should seek a variety of experiences and increasing responsibilities:

> Don't shun opportunities for experience early-on. The degree isn't that critical. I'd rather hire someone with good experience than someone without experience but with a degree (lately, we hire both). Be professionally involved in your field. If you are primarily interested in money, stay out of education. *(state-level administrator)*

> Find a job you like. It's easy to work well in that situation. Build diversity into your work experience through successive tasks. *(institutional researcher)*

Other respondents suggest that one should try to make a strong contribution in his or her current position, that one should not establish professional mobility as a primary goal, and that one should be flexible and professionally active:

> Make a strong contribution in your current position. . . .Accept new positions if they offer a personal challenge that you would find satisfying. *(state-level administrator)*

> Do *not* set professional mobility as a goal. Rather, commit yourself wholeheartedly to whatever is your current job. There is no greater satisfaction than a job well done (and appreciated). . . .If an opportunity to move arises, make the decision as much on the basis of the opportunity the new position provides for learning about institutional research and higher education as on the basis of salary, prestige, etc. *(institutional researcher)*

> Be flexible. Be ready and willing to accept a career change. *(nonacademic administrator)*

> Don't allow yourself to become a "vegetable." Make it a point to give an honest day's work, but work on your professional development; nobody else will do it for you. *(institutional researcher)*

Summary, Analysis, and Conclusions

The objectives of this study were (1) to gain some basic insights into career development and institutional research—insights that might be of general interest to the membership, and (2) to assist the Professional Development Services Board in program development. The summary and analysis which follows is organized around these two basic objectives.

It is important to reemphaisze, in summarizing the general insights gained from the survey, that the twenty respondents are a career-oriented group, with ten-twenty years (or more) of experience, who have achieved positions of responsibility in their various fields of endeavor. Moreover, they represent at least five professional subgroups. In a sense, they might be viewed as a panel of experts.

The comments of the group concerning professional background (education and experience) contain no special surprises. It is clear that various types of activities and experiences facilitate access to different career tracks (e.g., a faculty background is most likely to facilitate access to academic administration). The comments about professional skills are somewhat more intriguing. Most notable, as one progresses in his or her career, general skills (such as interpersonal, writing, and management), become more important than technical skills (computer, statistical, etc.). The challenge is that if one wants to get into "management," it is almost essential that he or she develop certain nontechnical skills while serving primarily in the role of a technician.

There is some consensus among the respondents about what to look for in a job/career: an opportunity to be where the "action" is; an opportunity to work with good people; and contant change or variety in professional responsibilities. The group dislikes bureaucracy and routine, but a certain amount of both may come with the territory.

The responses to Question 15, relating to personal and professional priorities, are also worthy of note. Top priority is given to job satisfaction. Although the sources of job satisfaction may vary, one of the dominant goals among this group appears to be captured by the terms "challenge," "responsibility," or "impact." It is also apparent that many of the respondents have made certain compromises for the sake of their careers by giving somewhat lower priority to family wishes and "quality of life."

The responses to the question about professional development activities provide some insight into how one should invest his or her time. If career advancement is the primary goal, it appears that the best investment is to devote most of one's energies to the job (verses external activities). However, it is interesting to note that many of the respondents view virtually all of their professional activities as job-relatcd. This may be one of the more tangible characteristics of a "professional," as opposed to one who views his or her work as a "job."

It is clear that the primary career options for institutional researchers are teaching, nonacademic administration, state-level administration/research, and institutional research. It is also apparent that, in general, administration at both the institutional and state levels is viewed as a step up on the career ladder for institutional researchers. If it is true that ability and luck play a major role in career development, one should probably maintain a healthy perspective about career advancement.

Finally, at the risk of oversimplifying a veritable wealth of advice from the twenty respondents, most of the comments center around three general themes. First, several respondents suggest avoiding long-term careers in institutional research. Second, one must decide whether he or she wants to be a generalist or a specialist. (The generalist is likely to rise higher in any given organization.) Third, variety (of experience) is an important element in career development.

What are the implications of these survey results for the work of the PDS Board (and for AIR in general)? First, it seems important to recognize the diverse constituency of AIR. There are many different professional subgroups whose needs should be addressed. Second, along the same lines, it may be appropriate to view institutional research as a generic activity rather than as a particular job role. If this line of reasoning is accepted, it would seem appropriate for AIR to encourage and assist its members in their career development efforts, whether or not those efforts are confined to traditional institutional research roles. Third, to the extent that the development of nontechnical skills is important in achieving the career goals of the membership, it would appear that the PDS Board and other AIR committees should give some attention to this area.

One of the major values of institutional research is that it provides data to support decisions. One of the potential *limitations* is that most decisions (outside the realm of the physical sciences) cannot be fully supported by available data; frequently, the decision maker must look beyond the data. In this instance, it seems appropriate at least to raise some *questions* that remain unanswered by the present study.

- First, this study has emphasized the role of formal education and experience in career development, but it has not addressed the value of such personal qualities as integrity, creativity, good judgment, a willingness to work hard, and a sense of humor. Even more challenging is the question of how one can develop such qualities!
- Second, several respondents emphasized the primary importance of doing a good job in one's current position. It has been suggested that one should consider this advice when deciding how to invest his or her time. However, many respondents also stressed the value of a *variety* of experiences. In managing their time, would academic professionals be well advised to heed the advice of the economists—to seek some diversity in their investments?
- A final question is whether the aspirations (and frustration) of institutional researchers are in any

way different or unique. In one sense, institutional researchers are similar to most other groups of higher education support staff. Although support staff play an important role and sometimes "rise to the top," top management and executive positions in most organizations are occupied by people who have performed line functions. It is probably also safe to suggest that there is a much greater need in most organizations, at least in terms of numbers, for capable specialists than there is for executives. For many, there will be ample satisfaction and reward, as one respondent suggested, in "a job well done."

On the other hand, many institutional researchers tend to work closely with decision makers on matters of policy—which should provide excellent training and undoubtedly does create certain expectations. Ultimately, it would seem that the career potential of institutional researchers in the future will depend partly on their individual values and priorities, partly on their ability to develop as generalists while serving as specialists, and partly on the professionalization (or lack thereof) of higher education management.

Notes

[1] One respondent suggested that the background and skills needed to *attain* a particlular position may not be precisely the same as those needed to be *successful* in that position. The respondent may be right, but the responses to Questions 9 and 10, as worded, do not lend themselves to this type of analysis.

[2] The following definition of the word "analyze" appears to capture the root meaning of the terms "analytical" and "analysis": "to study the factors of (a situation, problem, or the like) in detail, in order to determine the solution or outcome" *(Websters New Collegiate Dictionary)*.

[3] The following definitions of the term "management" are noted: "(1) act or art of managing; conduct; control; direction; (2) judicious use of means to accomplish an end; skillful treatment; (3) capacity for managing; executive skill" *(Websters New Collegiate Dictionary)*.

[4] A formal definition of the term "political" would be "of or pertaining to policy, or politics, or the conduct of government" *(Websters New Collegiate Dictionary)*. It is suggested that, in the present context, "political skills" refers to the exercise or understanding of power and influence, both on and off the college campus.

[5] The survey instrument did not include a definition of "non-job-related." It was the author's intent that this category would include all activities not formally associated with job assignments (e.g., professional organizational activities, consulting, publication, etc.). However, many of the actual responses in the "non-job-related" category pertain to non-professional activities, such as personal travel, raising a family, etc.

APPENDIX

AIR PDS BOARD
CAREER DEVELOPMENT SURVEY
(Condensed Version)

1. Name
2. Current Position
3. Institution/Organization
4. Telephone
5. Education: Bachelors Degree Field
   Masters Degree Field
   Doctoral Field
   Year Highest Degree Completed
6. Positions held (most recent first); Dates (years)
7. Please identify your three major interests by checking three of the blanks below:

Planning	Admissions/Marketing
Budgeting	College Students
Information Systems	Facilities
Program Review	External Relations
Evaluation	Other
Curriculum	

8. Please check the job title that best describes your current position:

   Institutional Researcher/Planner
   Faculty Member
   Academic Administrator
   Nonacademic Administrator
   State-Level Researcher/Planner
   Other

9. What kind of *background* (education/experience) is most likely to ensure *access* to and *success* in your current position (please note Question 10 before responding)?
10. What kinds of *skills* are most likely to ensure *access* to and *success* in your current position?
11. Please rank order the following skills in terms of their importance in your current position (1 = most important, etc.):

Computer Skills	Interpersonal Skills
Research Design	Statistical Skills
Writing Skills	Analytical Skills
Public Speaking	Other
Management Skills	

12. What do you like *best* about your current position?
13. What do you like *least* about your current position?
14. Since you completed your formal education, what kinds of activities/experiences have contributed most to your professional development? Please separate job-related and non-job-related activities, if possible.
15. Please rank order the following items in terms of their influence on your career choices during the past 5-10 years (1 = greatest influence, etc.):

Salary	Quality of Life
Prestige	Security/Stability
Job Satisfaction	Health
Wishes of Family	Other

16. What would you say are the 3-5 major *career options* open to institutional researchers (options need not be confined to higher education)? Also, what are the *critical factors* that affect an individual's access to each of these options?
17. What would be your advice to a young(er) institutional researcher who is looking for both job satisfaction and professional mobility during the next 25-40 years?